

Strategic Plan Summary

History

The Friends of Hartman Reserve initiated a Museum Assessment Program, Public Dimension (MAP III) in the fall of 2001. The MAP III self-evaluation was completed in April of 2002 and involved staff, board members from the Friends and the parent organization, the Black Hawk County Conservation Board, leaders in the community, and neighbors. A MAP III survey team visited the nature center and met with the nature center staff, board members from parent organization, and the Board of Directors of the Friends of Hartman Reserve in September 2002. The survey team filed their final report in November 2002. One of the recommendations from this report was to hire a consultant to conduct a strategic planning process.

A facilitator from the Institute of Decision Making from the University of Northern Iowa was hired in March 2003 to coordinate the process. A planning team that included staff, and board members from both the parent organization and the Friends of Hartman Reserve was assembled in April 2003 to determine planning needs and expectations. The planning team did the situational analysis using information from the MAP III self-analysis and the MAP III final report. The analysis included an overview of the Hartman Resource Management Plan, budget and endowment reports, summaries of the strategic plans from local school districts and city governments and national trends in nature center management. The situational analysis was presented to the staff, Board of Directors of the Friends of Hartman Reserve and representatives of the parent organization in May 2003 for their input. The same group met in June and focused on organizational values and vision. The third session in July developed strategic objectives. The final meeting validated the objectives and created an implementation and monitoring system. The Board of Directors of the Friends of Hartman Reserve recommended that the parent organization adopt the plan in November and the Black Hawk County Conservation Board approved it in December 2003.

Cornerstone Values

- ❖ Recreation within the context of concern for natural setting and heritage
- ❖ Education within the context of natural setting and heritage
- ❖ The long-term perspective in development and expansion
- ❖ Preservation, management, and restoration of the natural area and heritage
- ❖ Financial sustainability
- ❖ Community involvement

Commonly-Held Vision

- ❖ Preserving, managing, and restoring the natural area to maintain native diversity
- ❖ Providing recreational and leisure opportunities within the context of the natural setting and heritage
- ❖ Promoting better awareness, understanding and appreciation of our environment through education
- ❖ Pursuing opportunities for community involvement
- ❖ Providing the resources for short and long term financial sustainability

Goals & Objectives - Due to limitations of space, the following summary does not include the detailed action steps that include a timeline and who is responsible for each step

Education, Programming and Awareness

Priority Issue: Promote better awareness, understanding and appreciation of our environment through education among members of all segments of the community, both on- and off-site, whether casual visitors or program participants.

Strategic Objective 1: Develop and implement a comprehensive interpretive system for the natural resources of Hartman Reserve Nature Center to include a series of brochures, signage and website development.

Outcome-based Success Indicator: System in place to allow visitors to interpret without the aid of staff or naturalists.

Strategic Objective 2: Develop and implement diverse programming to reach the entire community.

Outcome-based Success Indicator: Increases in participation and attendance among the targeted groups.

Strategic Objective 3: Develop, market, and deliver two new programs that will generate fees appropriate to the cornerstone values. *Outcome-based Success Indicator:* Two profitable programs within one year, two paying groups to participate in HRNC programs on- or off-site.

Financial Sustainability

Priority Issue: Obtain consistent reliable funding.

Strategic Objective 1: Support the needs and the vision for Hartman Reserve Nature Center by creating cash

flow throughout the year from a variety of sources. *Outcome-based Success Indicator:* Meeting financial goals by raising an average of \$17,000 per month.

Strategic Objective 2: Increase the endowment to \$1,000,000 by adding \$20,000 per year. *Outcome-based Success Indicators:* Endowment generates enough revenue to support a full time staff position.

Community Involvement

Priority Issue: Provide opportunities for community involvement in HRNC and for HRNC involvement in the community

Strategic Objective 1: Develop and implement a process to educate and train members of the Friends of HRNC Board. *Outcome-based Success Indicator:* All Board members have completed training.

Strategic Objective 2: Create a more diverse Friends of HRNC Board and committees representing the community we serve. *Outcome-based Success Indicator:* Create a diverse Board who can effectively represent the community and support the mission of HRNC

Strategic Objective 3: Develop a volunteer base to supplement staff engaged in routine responsibilities.

Outcome-based Success Indicator: Volunteers are able to reduce the workload of the staff to accomplish the vision and mission of HRNC.

Strategic Objective 4: Encourage involvement of HRNC staff in high priority community activities.

Outcome-based Success Indicator: Increase the number of high priority community groups to which HRNC is linked and decrease participation in those of lower priority.

Preservation

Priority Issue: Preserve, manage, and restore the natural area to maintain native diversity.

Strategic Objective 1: Review and update activities indicated by present management plans. *Outcome-based Success Indicator:* Maintenance of diversity of native plants and animals.

Strategic Objective 2: Establish a plant diversity baseline and monitor over time. *Outcome-based Success Indicator:* Compilation of survey.

Strategic Objective 3: Identify and develop a distinctive long-term project to follow the osprey project.

Outcome-based Success Indicator: Participation in new project(s)

Strategic Objective 4: Maintain a natural buffer for HRNC. *Outcome-based Success Indicator:* Establish agreements of understanding with owners of neighboring property.

Recreation and Leisure

Priority Issue: Providing recreational and leisure opportunities within the context of the natural setting and heritage

Strategic Objective 1: Monitor present and proposed recreational and leisure activities. *Outcome-based Success Indicator:* Maintaining biodiversity and minimizing user conflict

Strategic Objective 2: Maintain physical resources required to support recreational and leisure activities.

Outcome-based Success Indicator: Physical resources are sufficient to support identified recreational and leisure activities

Facilities Plan

Priority Issue: Create and articulate a long-term perspective in development and expansion

Strategic Objective 1: Manage and improve the infrastructure and facilities by conducting annual reviews of the infrastructure and identify needs. *Outcome-based Success Indicator:* Completion of reports

Strategic Objective 2: Based upon identified needs, develop a capital improvement plan and a fund-raising strategy. *Outcome-based Success Indicator:* Development of the plan & strategy.

The plan is very new but several steps have already been taken. Each action item on the board agenda is correlated to an action step in the plan. Each information item in the board report is also connected to a step in the plan. When new proposals for policy or programming are proposed, they are discussed in relation to the cornerstone values and the commonly held vision. At the end of each year the board and the staff in light of progress towards the accomplishment of specific goals will review the plan.

Management of the endowment is one example of how the plan affects policy. The values & the vision both identify a long-term perspective to policy. To increase the endowment a decision has been made to reinvest the interest as long as possible to allow the principle to grow faster. The endowment will double in eight years if the interest is not harvested. This addresses the objective of adding \$20,000 to the endowment each year.

Narrative

1. Project Design

The goal of *Lucy's Meadow* is to restore 25 acres of the South Unit of Hartman Reserve Nature Center to the plant community found in pre-settlement times, an ecosystem called a Prairie/Oak Savanna. This process will involve volunteers and students in a service-learning environment and will be interpreted with signage.

The Hartman Resource Management Plan establishes policies for development and activities with a goal of protecting the natural and cultural resources of Hartman Reserve Nature Center while still providing reasonable public access. The 295.5 acres within the nature center are divided into a South Unit of 80 acres and a North Unit consisting of 215.5 acres. Each unit is divided into active use areas and natural areas. Active use areas include roads, trails, buildings, parking lots, utility corridors and other areas impacted by the use of people. Active use areas are maintained to provide public access. No more than 20% of the South Unit may be managed for active use. Natural areas are managed to maintain a diversity of native plants and animals and restore native ecosystems.

Each unit is broken into zones for management purposes. The South Unit is divided into a upland forest and a lowland forest zone. The western 25 acres of the lowland forest zone was a hayfield and a pasture that had reverted to elms, boxelders and other early succession trees before the Black Hawk County Conservation Board acquired it in 1976. Within the lowland forest zone is a one-acre prairie remnant. A power line cuts across the prairie and a trail loop links this zone to the rest of the nature center. This zone is visible from the South Riverside Trail, a paved recreational trail used by over 250,000 people per year. The eastern 16 acres of the lowland forest zone is a biologically diverse natural area that has been included in the Hartman Bluff State Preserve.

The management plan for the lowland forest zone of the South Unit calls for the using fire management and cutting to remove invasive trees from the prairie remnant. Once the prairie is cleared it will be selectively planted with ecotype specific prairie plants to restore native biodiversity and burned every other year. The plan for the rest of the zone calls for selective tree cutting, sporadic fire management and oak planting to regenerate native oaks and restore an oak/prairie savanna. The zone will transition from an open prairie to an oak savanna.

These management plans are very labor intensive and require an understanding of ecology, hand tools, chemicals, fire management and the use of volunteers. Volunteers have been able to do some of the tree clearing on the prairie and it has been burned on a two-year rotation with help from students and faculty from Hawkeye Community College and the University of Northern Iowa. To complete this plan will require a quarter time commitment from an existing full time employee over three years and the assistance of volunteers and students in elementary, junior high, high school and college.

Partnerships have already been built with faculty at Hawkeye Community College and the University of Northern Iowa to do ecological restoration. The Iowa Department of Natural Resources and the Iowa State Preserve Advisory Board are providing technical assistance. Silos & Smokestacks, a National Heritage Area and the Cedar Trail Partnership, a local trail advocacy group, and the Prairie Pathways Partnership, the coalition of agencies dedicated to interpreting the cultural and natural history of the Cedar Valley, have provided grants for interpretive signs. A new partner is ready to step in to help move this project along. Lucille Price was a life long neighbor who raised her family within walking distance of the South Unit. Upon her death in late 2003 her children united to create the Lucille Price Foundation with the goal of raising funds to restore the lowlands of the South Unit to an oak savanna. The working title for this project is *Lucy's Meadow* and the foundation is committed to providing a 1 to 1 match for this project and assist in the restoration.

2. Grant Program Goals

Lucy's Meadow falls under the goal of Sustaining Cultural Heritage. This category supports activities that museums undertake to sustain our cultural heritage. The care and management of the collection is an eligible activity for funding.

The tall grass prairie dominated the Iowa landscape before the land was converted to farms. Prairies made up 85% of the landscape. Oak savannas included a mix of trees and prairie plants that survived on hillsides and in stream valleys where the prairie fires were restricted by topography. The native peoples effectively exploited this landscape for a living and maintained it by setting frequent fires. The first settlers discovered a

sea of grass that occasionally supported a stand of oaks and hickories. One settler drew the analogy of traveling across Iowa to that of putting a canoe onto Lake Michigan. Very little of this cultural and natural heritage remains in Iowa. *Lucy's Meadow* is an attempt to restore a small example of an Iowa oak savanna for educational purposes.

The forest, prairies and wetlands of Hartman Reserve Nature Center are its collection. The ecological management and restoration of these natural areas is how the nature center cares for its collections.

3. How the Project Fits Into Strategic Plan & Mission

Lucy's Meadow addresses several components of the Hartman Reserve Nature Center Strategic Plan:

Education, Programming and Awareness - The priority of this goal is to provide an understanding of our environment to both program participants and the casual visitor. *Lucy's Meadow* will be seen by thousands of casual visitors from the South Riverside trail each year. These same visitors will be able to view the interpretive signage that will be placed within *Lucy's Meadow* to explain the relationship between fire and prairies/savannas. Hundreds of volunteers and students will gain first hand experience in ecological restoration through service learning opportunities while working on this project. Finally, *Lucy's Meadow* will be visited by thousands of school children during school field trips to the nature center.

- Community Involvement - Building partnerships and involvement between the community and nature center is the priority of this goal. *Lucy's Meadow* will bring hundreds of volunteers into the Hartman program and has already required the staff and the board of the nature center to build partnerships with several community groups.
- Preservation - The preservation, management and restoration of native ecosystems is central to the mission of Hartman Reserve Nature Center. *Lucy's Meadow* is a model of how other zones within the nature center can be managed and restored.
- Recreation and Leisure - The diversity of plants and animals that will inhabit *Lucy's Meadow* will provide passive recreational opportunities for thousands of casual visitors and hundreds of program participants.

Lucy's Meadow will create another generation of Lucille Prices. *Lucy's* children have ownership in Hartman Reserve Nature Center because they were involved in the programs and the natural area. After 30 years they are now giving back to the nature center by volunteering and raising money in their mother's name. The hundreds of volunteers who participate in this project will come back to participate in other nature center programs and eventually will make a contribution of time and money. The publicity that comes out of this project will strengthen the nature center's position within the community. When the grant money runs out a small natural area will have been restored and the nature center will have created another generation of supporters.

4. Strategic Plan: Process & Financial Resources

The Friends of Hartman Reserve initiated a Museum Assessment Program, Public Dimension (MAP ill) in the fall of 2001. The MAP ill self-evaluation was completed in April of 2002 and involved staff, board members from the Friends and the parent organization, the Black Hawk County Conservation Board, leaders in the community, and neighbors. A MAP ill survey team visited the nature center and met with the nature center staff, board members from parent organization, and the Board of Directors of the Friends of Hartman Reserve in September 2002. The survey team filed their final report in November 2002. One of the recommendations from this report was to hire a consultant to conduct a strategic planning process. This process, which has been described in more detail earlier in this grant, was completed in December 2003.

Another observation that came out of the MAP ill /strategic planning process was the need to diversify income sources and increase the endowment. The strategic plan identifies consistent reliable funding as a priority. The plan has created a series of action steps to increase the cash flow from a variety of sources.

Examples of these steps include:

- Create fundraising committee to review possibilities
- Research and write grants
- Secure corporate sponsorships
- Increase membership contributions
- Program fees
- Special events
- Gift shop sales

A long-term action step is to increase the endowment through a planned giving campaign and by reinvesting the interest. The desired outcome is to add \$20,000 year until endowment is able to support one full time employee.

5. Appropriateness of Project for Institution & Audience

The intended audience for *Lucy's Meadow* is the causal trail user, college students, elementary & junior high school children, high schoolers, youth groups, after school programs and retirees. Because Lucy's Meadow is visible from the South Riverside Trail, over 250,000 people per year will see this restoration project. Up to 35,000 people may walk, run or ski through the zone. Another 10,000 school children, primarily elementary and junior high students, will visit the site during a school field trip. Because of a partnership with the after school program, ECHOES, several hundred junior high school students will participate in service learning opportunities at this site. Several hundred college students and scouts will participate in service learning opportunities at *Lucy's Meadow*. A few dozen dedicated senior citizens will volunteer their time to work on this project.

The intended audience fits into the strategic plan under the following goals:

- Education, Programming and Awareness - *Lucy's Meadow* creates many opportunities for both passive and active learning opportunities for a wide range of visitors.
- Community Involvement - The service learning opportunities will impact several hundred people of various ages
- Recreation and Leisure - Several thousand people will walk, run or ski through *Lucy 's Meadow*. Because Hartman Reserve Nature Center has been designated an Important Bird Area in Iowa and includes a state preserve, *Lucy 's Meadow* will also draw dedicated and casual birders because of the diversity of habitat created during the restoration process.

Geography & Demographics

Hartman Reserve Nature Center (HRNC) is located in Waterloo but is surrounded by Cedar Falls, within Black Hawk County, Iowa. Black Hawk County is the major urban area in Northeast Iowa, surrounded by predominantly rural, agricultural counties. Cedar Falls is home to 25,000 while 70,000 reside in Waterloo. The rural areas and other small towns in the county add another 25,000 people for a total of 120,000 for the county. Of the 120,000, a little more than 20,000 are school age children.

Waterloo is home to John Deere Tractor, Iowa Beef Products (IBP) and Hawkeye Community College while Cedar Falls hosts the University of Northern Iowa (UN!). Overall the area is 75% blue-collar, 23% professional and 2% agricultural. The county is 91.2% Caucasian, 6.9% African-American, 1.9% Hispanic/Asian. Up to 4,000 Bosnians and 2,000 Hispanics have moved into the county to work at IBP. The county has lost 12% of its population over the last decade due to John Deere downsizing.

Iowa leads the nation in percentage of citizens 80 years and older and is in the top five in the percentage of citizens 65 and older. Waterloo is losing school children and growing older. Iowa leads the nation in the percentage of double income families. Because of the high rate of immigration to Waterloo, the number of two income families in Waterloo is higher then the state average.

The number of school children in the Waterloo School District dropped from 20,000 in 1980 to less then 10,000 in 2000. Four elementary, one junior high and one high school have closed. Eleven schools in Black Hawk County are on the "To Be Watched List" as a result of the *Leave No Child Behind Act*. One response to the lower test scores and high number of parents who work has been for the Cedar Falls and Waterloo School Districts to provide a comprehensive after school program call ECHOES.

As a regional nature center, HRNC also serves the surrounding 8 counties, which adds another 125,000 potential users and brings the overall possible audience up to 250,000. Wartburg College is located in the first

county to the north. Because the city of Cedar Falls surrounds the nature center almost 50% of the program attendance is from Cedar Falls. Waterloo visitation makes up about 25% while the remaining 25% comes from the surrounding rural areas.

A visitor survey conducted in the fall of 2000 by students from University of Northern Iowa found that 97% of the trail users were Caucasian, 70% were over 35 years of age, and 72% lived within 5 miles. The majority of the users, 70%, used the trails once a week or less and 76% on a Sunday. The typical trail user was a Caucasian, middle aged, working class, local resident who came for leisure on a weekend with a companion. This same survey estimated that 35,000 people walk, rode, ran or skied the trails every year. Another 20,000 people visit the nature center on a school field trip or attend a program or a special event.

6. Project Resources: Time & Budget

The major work on *Lucy's Meadow* will be conducted over three years. The 25 acres will be broken into three segments of 7 to 8 acres. Segment I is the closest to the prairie remnant and work will begin in the fall of 2004. Segment n is farther to the east and work will begin on it in the fall of 2005. The third segment is farthest east and work will begin on it in the fall of 2006. Each segment will be restored according to the following time line:

- Girdling & Cutting - Non-native trees will be cut or girdled and treated during the first winter by staff or trained volunteers. (One or two individuals working a few hours per week for several weeks as the weather and schedule allow.)
- Planting - The next spring volunteers will plant oak trees and prairie seeds in areas that are now exposed to direct sunlight due to cutting and girdling. (Thirty to a hundred volunteers planting for a few hours one or two days. This activity will be tied to our annual Earth Day Celebration)
- Invasive Species Control- Weeds and invasive species will be controlled by staff or trained volunteers during the summer months on an annual basis. (One or two individuals working a few hours per week for several weeks as the weather and the schedule allow.)
- Fire Management - Trained volunteers under the supervision of staff will burn the segment as the fuel load and weather allow in the spring or fall. Burning will be repeated annually if deemed necessary. (A dozen volunteers or staff working one day for a few hours. Burning is done in cooperation with faculty and students from University of Northern Iowa and Hawkeye Community College.)
- Second Planting - Additional trees and prairie plants will be planted at the start of the second growing season. (Thirty to a hundred volunteers planting for a few hours one or two days. This activity will be tied to our annual Earth Day Celebration.)
- Second Cutting - Volunteers and staff will cut and treat non-native trees that were missed in the second winter. (One or two individuals working a few hours per week for several weeks as the weather and schedule allow.)
- Education - Staff and volunteers will use the site for educational programs. One to two interpretative signs will be placed each summer. (One or two individuals working a few hours per week year round as the weather and schedule allow.)

This grant will be used to fund 10 hours/week of professional staff time over three years to conduct educational programs, coordinate volunteers and restore *Lucy's Meadow*. With benefits, ten hours of staff time over one year is worth \$12,230. Oak seedlings and prairie seed will cost \$1,000 per year. The Lucille Price Foundation and the Friends of Hartman Reserve will provide a match of \$6, 115 per year for the staffing and \$500 year for the plantings. Hartman Reserve Nature Center asks for \$19,845 over three years to fund *Lucy's Meadow*.

7. Project Resources: Personnel & Technology

This grant will be administrated by the Nature Center Director who has a M.A. and B.A. biology with secondary teaching certification and 2 years experience as a high school science teacher. The director has worked 24 years in resource management, environmental education, and interpretation. The last 20 years have been spent as the nature center director at Hartman Reserve Nature Center. The director is the former secretary, vice-president and president of the Iowa Association of Naturalists, and Deputy Director and

Director for Region V of National Association for Interpretation (NAI). The director is the past chair of the NAI national scholarship committee and the current vice-chair of Nature Center Directors and Administrators section of NAI. As one of five office board members on the Iowa Conservation Education Program Board, the director is responsible for reading, granting and supervising \$350,000 worth of grants annually.

The Nature Center Director is responsible for managing Hartman Reserve Nature Center and accomplishing its mission. *Lucy's Meadow* is core to the Hartman mission and will be a high priority. The director has a history of serving in leadership roles, juggling responsibilities and delegating.

The naturalist who will coordinate *Lucy's Meadow* has a B.A. in natural history interpretation and 9 years experience as a naturalist. This naturalist has extensive experience in prairie ecology, fire management, and forestry. He is an experienced chainsaw operator and is a licensed chemical applicator. He has written and administered the grant that funds the Iowa Conservation Corps, a six-week work/learn program for 10 high school youth, for the last 8 years. He has also supervised volunteers and interns. He is a member of the Iowa Association of Naturalists, Iowa Recycling Association, and the National Association for Interpretation.

Project Budget

Budget Justification

Jim Weimer, recycling education naturalist, will coordinate the ecological restoration of *Lucy's Meadow*. This project will average 10 hours a week or 25%. Mr. Weimer's base salary is \$37,414 for fiscal year 2005. Thus, the cost for year one is \$9,353. The staff of Hartman Reserve Nature Center are public employees represented by a union with a very good benefit package. When all of the fringe benefits including FICA, the Iowa Public Employees Retirement contribution, health, and life insurance are added in the rate equals 38%. The health insurance is the largest single benefit in the fringe package. At 38% the fringe benefits total up to \$3,590 for year one.

Lucy's Meadow will be restored over the course of three years. The next union contract has not been finalized but it is estimated that each employee will get a 3% increase each year over the term of this project. Thus, the base salary and fringe benefits have been increased by 3% in year 2 and year 3. The health benefit is the biggest variable in this estimate and one can only assume that these costs will go up.

The only supplies and materials that are being requested are for trees and prairie seed. The costs listed are very minimal. It has been easy to raise funds for planting trees and prairie seed from local organizations and individuals and it is not necessary to include these additional costs in the grant.

The care and management of the Hartman collection (its natural resources) is core to the mission. In a perfect world, a full time natural resource manager would be responsible for this task. The MAP III self-evaluation identified the addition of a full time resource manager as a long-term goal. Using existing staff to perform this task on a part-time basis is the best solution at this time. There are two recycling education naturalists on the staff. It will be very easy for the second naturalist to cover for Jim Weimer when he is working on *Lucy's Meadow*.